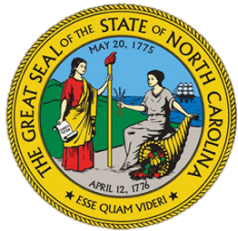


North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Vaccine Administration User Guide

Version 6

March 4, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine
If you are in North Carolina, you can also call the Provider Contact Center at (877) 873-6247 and
select option 8. The Provider Contact Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register:
VAC2021*

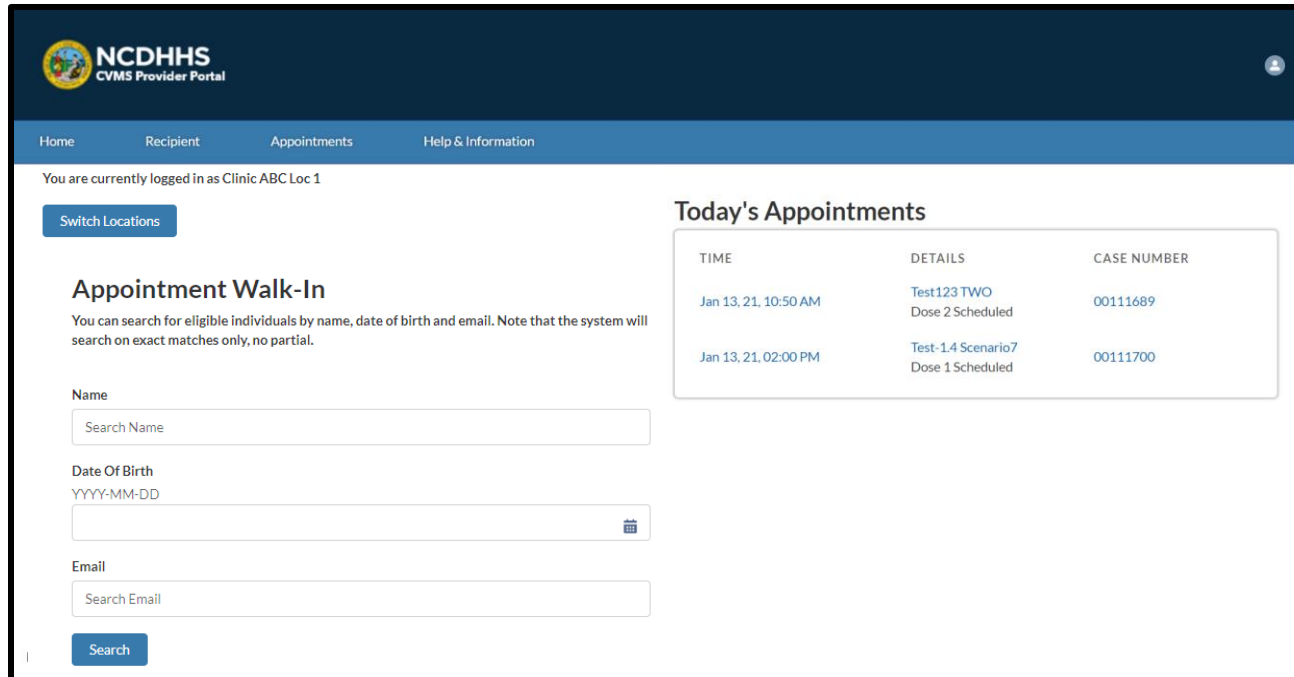
3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Vaccine Administration Overview and Process	4 - 7
Confirm Location of Operations	8 - 12
Enter & Submit Vaccine Administration Record	13 - 22
Edit Vaccine Administration Details After Submission	23 - 31
Edit Vaccine Administration Recipient	32 - 37
Post-Vaccine Administration Reminders	38 - 39
Appendix	40 - 43

Vaccine Administration Overview and Process

Overview



The screenshot shows the NCDHHS CVMS Provider Portal. The header includes the NCDHHS logo and the text "CVMS Provider Portal". Below the header is a navigation bar with links: Home, Recipient, Appointments, and Help & Information. A message states "You are currently logged in as Clinic ABC Loc 1". A "Switch Locations" button is present. The main content area is divided into two sections. The left section, titled "Appointment Walk-In", contains instructions: "You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial." It includes input fields for Name (with a "Search Name" placeholder), Date Of Birth (with a "YYYY-MM-DD" placeholder and a calendar icon), and Email (with a "Search Email" placeholder). A "Search" button is at the bottom. The right section, titled "Today's Appointments", displays a table of appointments.

TIME	DETAILS	CASE NUMBER
Jan 13, 21, 10:50 AM	Test123 TWO Dose 2 Scheduled	00111689
Jan 13, 21, 02:00 PM	Test-1.4 Scenario7 Dose 1 Scheduled	00111700

Administering the COVID-19 vaccine typically involves:

1. Confirming Recipient consent to receive the COVID-19 vaccine
2. Recording the Vaccine Administration details
3. Understanding post-Vaccine Administration reminders

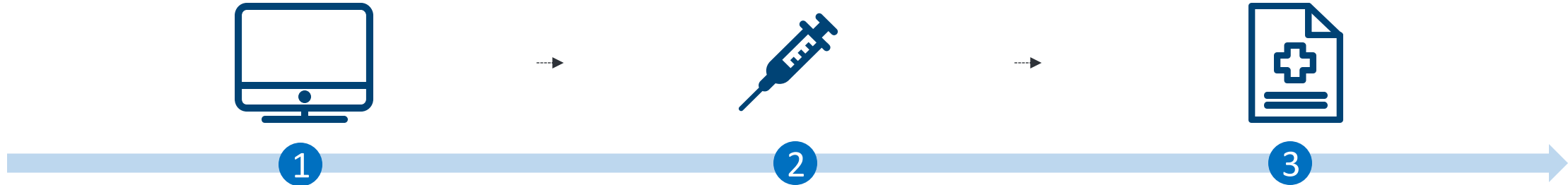
The processes included in this training are for the **Healthcare Provider and Healthcare Location Manager** profiles.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer or Edge non-Chromium browsers are not supported)
- Log into the CVMS Provider portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Vaccine Administration Process



Healthcare Provider creates the Appointment Booking.

Healthcare Provider opens the Appointment Booking and begins Vaccine Administration process.

Healthcare Provider gives Recipient Emergency Use Authorization Fact Sheet.

Recipient receives COVID-19 vaccination.

Healthcare Provider enters Vaccine Administration information and submits Vaccine Administration record.

The Vaccine Administration process is now complete.

Healthcare Provider provides Recipient with V-safe Information Sheet and a few reminders on second dosage, Proof of Vaccination, and Adverse Event reporting.

Key Terms

EUA Fact Sheet

Under section 564 of the Federal Food, Drug, and Cosmetic Act, the FDA Commissioner may allow unapproved medical products or unapproved uses of approved medical products to be used in an emergency to diagnose, treat, or prevent serious or life-threatening diseases or conditions caused by CBRN threat agents when there are no adequate, approved, and available alternatives. This is known as Emergency Use Authorization.

Confirm Location of Operations

Step 1 of 4: Verify Location for Operations

Before you begin logging **VACCINE ADMINISTRATION** details, you will need to verify which location you are operating in.

The current location you are operating in is displayed at the top left of the screen. If the location is correct, no further action is required.


Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

To learn more about getting access to other locations, speak to your location's **VACCINE COORDINATOR**.



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

You are currently logged in as Crimson Skies - Location 1

Switch Locations

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Search Name

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Step 2 of 4: Begin Switching Locations


If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

- 1. Select the **SWITCH LOCATIONS** button
- 2. A pop-up window will appear asking you to select the location you would like to be operating in

Audience

Healthcare
Provider

Healthcare
Location Manager



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

You are currently logged in as Crimson Skies - Location 1

Switch Locations

Appointments

You can search for eligible patients by location, name, date of birth, or email. Search on exact matches.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Select the location to proceed:

	Location Na... <div>▼</div>	Street <div>▼</div>	City <div>▼</div>	State <div>▼</div>	Country <div>▼</div>	Postal Code <div>▼</div>
<input type="radio"/>	Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input type="radio"/>	Crimson Skies - Location 3				USA	
<input type="radio"/>	Crimson Skies - Location 2	null null			USA	

Submit

Close

Step 3 of 4: Submit New Location To Operate In

- 1. Select the location that you would like to operate in
- 2. Verify that the address matches the desired location
- 3. Click **SUBMIT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

To see a list of locations you have access to operate in / can search for, speak to your location's **LOCATION MANAGER** or your location's **VACCINE COORDINATOR**.

Select the location to proceed:


Location Na... ▾	Street ▾	City ▾	State ▾	Country ▾	Postal Code ▾
<input type="radio"/> Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input checked="" type="radio"/> Crimson Skies - Location 3				USA	
<input type="radio"/> Crimson Skies - Location 2	null null			USA	

Submit

Close

Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

You are currently logged in as Crimson Skies - Location 3

Switch Locations

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Search Name

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

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Provider

Healthcare
Location Manager

Enter & Submit Vaccine Administration Record

Step 1 of 9: Recipient Appointment Booking


When a **RECIPIENT** walks in to receive their COVID-19 vaccine, the Healthcare Provider who initially verifies their Vaccine Group and identity will create an Appointment Booking for the Recipient.

The Healthcare Provider who will administer the COVID-19 vaccine will select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE**.

Audience

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Location Manager



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Step 2 of 9: Begin Vaccine Administration

When you are ready to begin the **VACCINE ADMINISTRATION PROCESS**, navigate to the **HOME PAGE** and find the **CORRECT BOOKING**. The Appointment Booking will initiate the Vaccine Administration process, where you will **VERIFY THE RECIPIENT’S IDENTITY, REVIEW THEIR MEDICAL HISTORY, CAPTURE THE VACCINE DETAILS**, and more.

- 1. On your Home Page, locate the **TODAY’S APPOINTMENTS** section
- 2. Click the **CORRECT APPOINTMENT BOOKING** for the Recipient


Audience

Healthcare
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Healthcare
Location Manager

Tips

Some users can view **TODAY’S APPOINTMENTS** for multiple locations. Be sure to click on the correct appointment booking for the desired location.



CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Search Name

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Step 3 of 9: Receive Verbal Consent

Clicking on the Recipient’s Appointment Booking takes you to the **PATIENT VERIFICATION & SCREENING** page.

- 1. Review the Recipient’s health information on the right-hand side of the screen and click **NEXT**
- 2. On the **VACCINE CONSENT AND MEDICAL HISTORY** page, read the **DISCLOSURE STATEMENT** to the Recipient
- 3. After you **RECEIVE VERBAL CONSENT**, you can **CHECK** the check box indicating that consent was provided and click **NEXT**

*Note: The Recipient’s **MEDICAL HISTORY** will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.*

Audience

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Provider

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Location Manager

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Step 4 of 9: Provide the EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also **PROVIDE the EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET** and the **V-SAFE INFORMATION SHEET** to the Recipient or guardian.

1. Obtain copies of the EUA Fact Sheet at this website (There will be different EUAs for different vaccines): <https://www.fda.gov/media/144414/download> (Pfizer EUA)
2. Obtain copies of the V-safe Information Sheet at this website: https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the Recipient or guardian with the EUA Fact Sheet prior to vaccination.
4. Ask the Recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the Recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.

Audience

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Location Manager

Step 6 of 10: Review the Vaccine Administration Details

Once you receive the Recipient’s consent and provide them with the appropriate EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED**.

NCDHHS
CVMS Provider Portal

HomeRecipientAppointmentsHelp & Information

Vaccine Administration

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First DoseSecond Dose

* Route

Intramuscular (IM)Subcutaneous (SQ)Intradermal (ID)

* Date and Time of Vaccination
DateTime

Jan 13, 20212:18 PM

On Behalf of (Clinician)
-- Select Vaccine Administrator --

123Enter vialClear

Medical History
VaccineAdmin Test
DOB: Dec 12, 1933
Age: 87

Gender
Male

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number
100

Serial Number
100

NDC
59267-1000-02

Expiration Date
Jan 13, 2021

Notes

No notes to report.

Previous

Email Address

Phone Number

Preferred Communication Channel
None

Next

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Audience

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Provider**

Healthcare Location Manager

Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

Vaccine Administration	
Dose 1 Details Date and Time 12/17/2020, 02:58 PM EST Administered By RegressionTest HCP On Behalf of (Clinician) RegressionTest HCP Location RegressionTest Loc 12 Vaccine Inventory RegTest3 Delivery 12/16/2020 Vaccine Product Pfizer-BioNTech (25 MDV) COVID-19 Vaccine Lot Number Lot999999	Medical History Cailen R DOB: Dec 17, 2000 Age: 25 Gender Male Race Asian Ethnicity Not Hispanic or Latino Health Status None Covid-19 Status No Critical Care Yes

If your Recipient has already **RECEIVED THE FIRST DOSE** of the COVID-19 vaccine, you will see **FIRST DOSE DETAILS** at the top of the **VACCINE ADMINISTRATION PAGE**.

Dose 1 Details will include:

- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

Alternately, if a Recipient received their first dose outside of CVMS (e.g., out of state, through a Long-Term Care facility), the **FIRST DOSE DETAILS** will not appear. You may still mark the dose as a **SECOND DOSE**. In that instance, a warning label will appear at the top of the screen prompting you to verify that the Recipient has received their first dose.

Audience

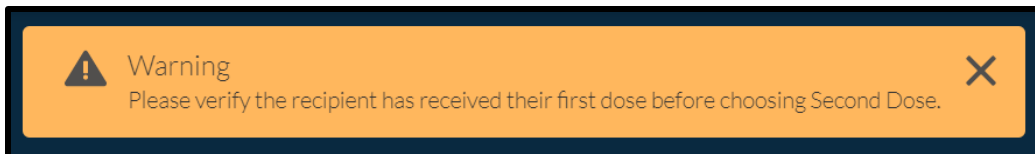
**Healthcare
Provider**

Healthcare Location Manager


Tips

Verify if a prior dose was given to the Recipient.

Selecting **SECOND DOSE** will put the Recipient into **DOSE 2 ADMINISTERED** status.



Step 8 of 10: Enter Vaccine Administration Details



HomeRecipientAppointmentsHelp & Information

Vaccine Admin

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First DoseSecond Dose

* Route

Intramuscular (IM)Subcutaneous (SQ)Intradermal (ID)

* Date and Time of Vaccination

Date

Jan 13, 2021

Time

2:18 PM

On Behalf of (Clinician)

-- Select Vaccine Administrator --

123

Enter vial

Clear

On the **VACCINE ADMINISTRATION** page, you will capture all **VACCINE DETAILS**.

1. Populate all **REQUIRED** vaccination details

- Injection Site
- Dose
- Route
- Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field **ON BEHALF OF (CLINICIAN)** allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Audience


Healthcare Provider

Healthcare Location Manager

Tips

Use the drop-down for the **ON BEHALF OF (CLINICIAN)** field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, **DO NOT ENTER** anything in the **ON BEHALF OF (CLINICIAN)** field.



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20

Step 9 of 10: Enter Vaccine Administration Details

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number

100

Serial Number

100

NDC

59267-1000-02

Expiration Date

Jan 13, 2021

Notes

No notes to report.

Previous

- Continue populating all **REQUIRED** vaccination details
 - Vaccine Product (Vaccine Type)
 - Available Vaccine Inventory (what lot?)

Note: If you select a **SINGLE-DOSE** vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

- Enter any additional notes that are relevant in the **NOTES** text field
- REVIEW ALL VACCINE DETAILS**
- Click **NEXT**

*If you are administering a second COVID-19 vaccine dose, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER and EXPIRATION DATE will **AUTO POPULATE** once you select the Product and Available Vaccine Inventory.

Step 10 of 10: Finish an Appointment

The final page of the Vaccine Administration Process is the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the Recipient to schedule their second dose appointment (if applicable). Click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

If this is a second dose, or you have administered a **SINGLE-DOSE** product, the **SCHEDULE FOLLOW UP** page will not appear. You will instead be routed back to the **HOME PAGE**.

See the next section for a few POST-APPOINTMENT REMINDERS.

Audience

Healthcare
Provider

Healthcare
Location Manager

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Medical History

VaccineAdmin Test
DOB: Dec 12, 1933
Age: 87

Gender

Male

Edit Vaccine Administration Details After Submission

Step 1 of 8: Navigate to Appointments Tab

If a **RECIPIENT** has incorrect details entered during Vaccine Administration, the Healthcare Provider **MUST EDIT** the details to ensure data accuracy.

To begin, navigate to the **APPOINTMENTS** tab.


Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Healthcare Providers can only update Vaccine Administration details for Recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Search Name

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 27, 21, 08:03 AM	Michelle Test4 Dose 2 Scheduled	00112264	Clinic ABC Loc 1
Jan 27, 21, 08:03 AM	Test-1.4 Scenario150 Dose 1 Scheduled	00112059	Clinic ABC Loc 1
Jan 27, 21, 08:04 AM	Test-1.4 Scenario142 Dose 2 Scheduled	00112265	Clinic ABC Loc 1
Jan 27, 21, 09:09 AM	Michelle Test15 Dose 2 Scheduled	00112266	Clinic ABC Loc 1
Jan 27, 21, 10:23 AM	Ben3 Ben3 Dose 2 Scheduled	00112268	Clinic ABC Loc 1

View all

Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location.
Verify that you are currently logged in to the same location that the Recipient received their vaccine.

Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

You are currently logged in as Clinic ABC Loc 1

Appointments

All Appointments

11 items

Search Appointments

Search by Name, Location, Vaccine Status

From

To

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Case	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	00112283	Jan 27, 2021	2:21:32 PM	Jay UAT3Phase2Grou...	1955-11-20	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00111103	Jan 27, 2021	12:31:12 PM	sahil gupta	1987-07-13	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00112274	Jan 27, 2021	11:47:41 AM	Grace Wiy	1990-01-26	Clinic ABC Loc 1	Dose 1 Scheduled	New
<input type="checkbox"/>	00112270	Jan 27, 2021	10:32:04 AM	Test123 Eleven	1953-01-14	Clinic ABC Loc 1	Dose 2 Scheduled	New

Audience

Healthcare Provider

Healthcare Location Manager

Tips

The **APPOINTMENTS** tab will default to show you appointments that were scheduled for the same day you are logged in.

Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the **VACCINE ADMINISTRATION**, you must first locate the correct **APPOINTMENT RECORD**.

- 1. Enter the name of the Recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating
- 2. Click **SEARCH**
- 3. Click the **CORRECT APPOINTMENT RECORD** for the Recipient. The correct record will be the one that shows a **VACCINE STATUS** as either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Alternatively, you may search for the Recipient via the **RECIPIENT TAB**, locate their Recipient record, and click on their Appointment record.

Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

You are currently logged in as Clinic ABC Loc 1

Appointments

All Appointments

2 items

Search Appointments

VaccineAdmin Test

From

2021-01-10

To

2021-01-20

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	00111703	Jan 13, 2021	2:18:25 PM	VaccineAdmin Test	1933-12-12	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00112070	Jan 19, 2021	4:00:27 PM	VaccineAdmin Test	1933-12-12	Clinic ABC Loc 1	Dose 2 Canceled	Canceled

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26

Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the Recipient.

1. All Vaccination details are visible including:

- Date and Time
- Vaccine Product / Inventory
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field

NCDHHS CVMS Provider Portal

Home Recipient Appointments Help & Information

DETAILS RELATED Change Vaccine Inventory Change Recipient

Case Number 00111703	Vaccine Status Dose 1 Administered
Account Name Clinic ABC Loc 1	Vaccine Pfizer-BioNTech (195 MDV) COVID-19 Vaccine
Contact Name VaccineAdmin Test	Vaccine Inventory Expiration 1/13/2021 8:30
Appointment Date/Time 1/13/2021, 2:18 PM	Injection Site Left Deltoid
Cancellation Reason	Route Intramuscular (IM)
Date and Time of Vaccination 1/13/2021, 2:18 PM	Administered By Steve DiGangi
Adverse Reaction Consent <input checked="" type="checkbox"/>	On Behalf of (Clinician)
Schedule Dose2 Followup Email <input type="checkbox"/>	Case Owner User16073838354179855083
Additional Information	
Status Closed	Notes No notes to report.
Date/Time Opened 1/13/2021, 2:05 PM	Date/Time Closed 1/13/2021, 2:20 PM
System Information	
Created By Steve DiGangi , 1/13/2021, 2:05 PM	Last Modified By Steve DiGangi , 1/13/2021, 2:20 PM

Audience

Healthcare
Provider

Healthcare
Location Manager

Step 5 of 8: Edit Vaccine Administration Details

Case Number
00111703

Account Name
Clinic ABC Loc 1

Contact Name
VaccineAdmin Test

Appointment DateTime
Date: 1/13/2021 Time: 2:18 PM

Cancellation Reason
--None--

Date and Time of Vaccination
Date: 1/13/2021 Time: 2:18 PM

Adverse Reaction Consent
☒

Schedule Dose2 Followup Email
☐

Vaccine Status
Dose 1 Administered

Vaccine
Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory
Expiration 1/13/2021 8:30

Injection Site
Left Lower Forearm

Route
Subcutaneous (SQ)

Administered By
Search Contacts...

On Behalf of (Clinician)
Simon Couderc

Case Owner
User16073838354179855083

Notes
No notes to report.

Additional Information
*Status
Closed

System Information
Created By
Steve DiGangi, 1/13/2021, 2:05 PM

Last Modified By
Steve DiGangi, 1/13/2021, 2:20 PM

Cancel Save

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. Edit any of the following fields to the correct information:

- Date / Time of Vaccination
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. Do not edit any of the following fields:

- Account Name
- Cancellation Reason
- Appointment Date / Time
- Case Owner

3. Click **SAVE**

Audience

Healthcare
Provider


Healthcare
Location Manager

Tips

From this screen, you cannot edit the **VACCINE INVENTORY**. To see how to edit Vaccine Inventory, look at the next slide.

Step 6 of 8: Change Vaccine Inventory

To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.



Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Case Number

00111703

Account Name

Clinic ABC Loc 1

Contact Name

VaccineAdmin Test

Appointment DateTime

1/13/2021, 2:18 PM

Cancellation Reason

Date and Time of Vaccination

1/13/2021, 2:18 PM

Vaccine Status

Dose 1 Administered

Vaccine

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory

Expiration 1/13/2021 8:30

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

Steve DiGangi

Change Vaccine Inventory

Change Recipient

Audience

Healthcare Provider

Healthcare Location Manager

Tips

Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.

Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

- 1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
 - 2. Locate and click the correct inventory, or type the name of the inventory to quickly find it
- Note:** You can not change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration

3. Click **FINISH**

Change Vaccine Inventory

Existing Vaccine Inventory:
Expiration 1/13/2021 8:30

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

Case Number:
00111703

Account Name:
Clinic ABC Loc 1

Contact Name:
VaccineAdmin Test

Appointment Date/Time:
Jan 13, 2021, 2:18:25 PM

Cancel

Finish

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

SomTestInventoryUAT3

Grace Pfizer Inventory

Expiration 1/13/2021 8:30

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.

Step 8 of 8: Review the Vaccine Administration Details Change History

Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Related Cases (0)

New

Case History (6+)

Date	Field	User	Original Value	New Value
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Grace Pfizer Invent...	Expiration 1/13/20... ▼
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Expiration 1/13/20...	Grace Pfizer Invent... ▼
1/27/2021, 3:28 ...	Administered By	Steve DiGangi	Steve DiGangi	▼
1/27/2021, 3:28 ...	Route	Steve DiGangi	Intramuscular (IM)	Subcutaneous (SQ) ▼
1/13/2021, 2:20 ...	Vaccine Inventory	Steve DiGangi		Expiration 1/13/20... ▼
1/13/2021, 2:20 ...	Status	Steve DiGangi	New	Closed ▼

View All

At any point, you can review the history of changes made to the Vaccine Administration details.

1. From the Appointment Record, click the **RELATED** tab
2. View **CASE HISTORY** to see the date, time, user, old value, and new value for each individual field that was changed

Audience

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Edit Vaccine Administration Recipient

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details for the wrong **RECIPIENT**, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Full name (required), ex: John Smith

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
------------	-----------	---------------	--------	--------------------	----------	-----------------------	-------

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

No results, please search again.

Audience

Healthcare Provider

Healthcare Location Manager

Tips

Healthcare Providers can only change Vaccine Administration Recipient for Recipients who received their vaccine through the same location as the Healthcare Provider.

Step 2 of 5: Locate Recipient


Clicking on the **RECIPIENT TAB** takes you to a screen to search all Recipients in CVMS.

- 1. Type in the incorrect recipient's name in the search box
- 2. Click **SEARCH**
- 3. Select the recipient's name

Audience

Healthcare
Provider

Healthcare
Location Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q Jane WrongName

Date of Birth (optional), MM/DD/YYYY

Search

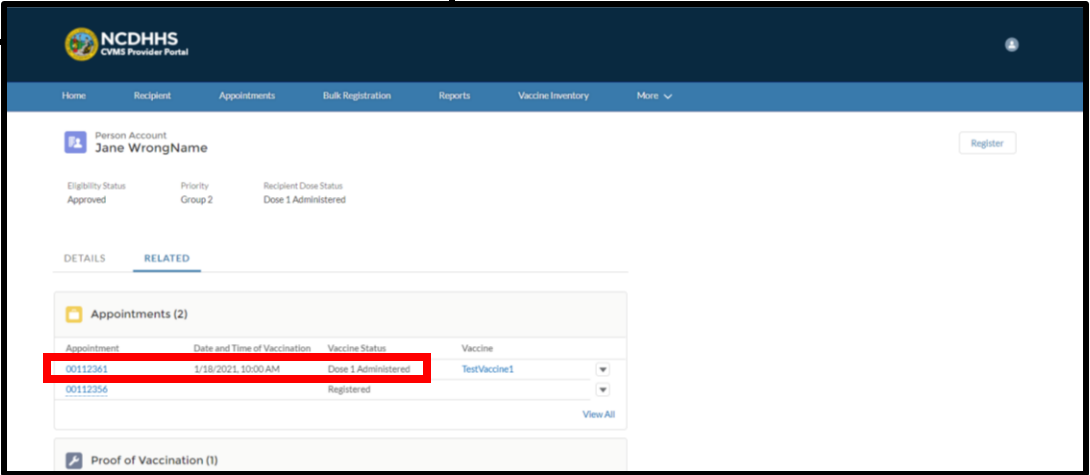
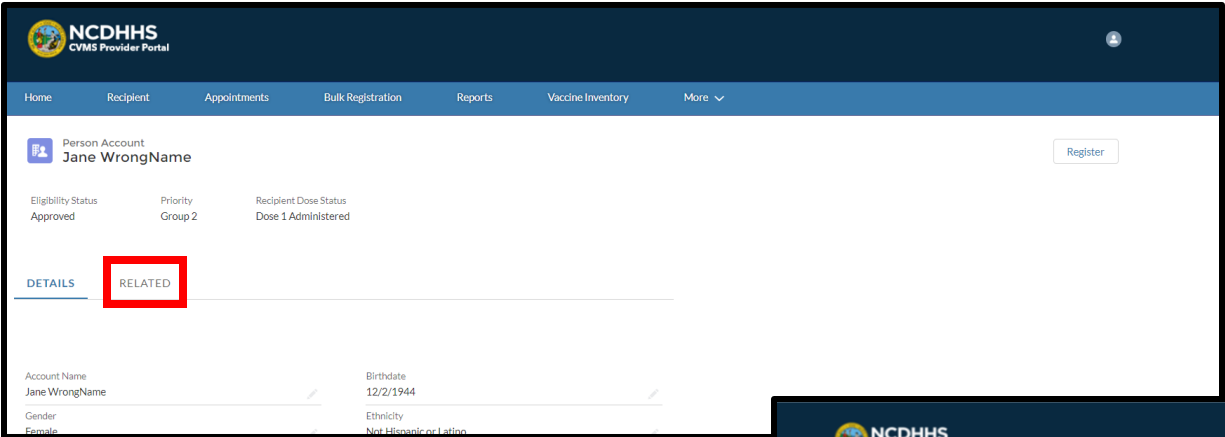
Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
Jane	WrongName	Dec 2, 1944	Female	Approved	Group 2	Dose 1 Administered	

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

- 1. Click on the **RELATED** tab under the recipient's name to view appointment information
- 2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**)



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Location Manager

Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore

DETAILSRELATED

Case Number00112361

Account NameClinic ABC Loc 1

Contact NameJane WrongName

Appointment DateTime1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination1/18/2021, 10:00 AM

Adverse Reaction Consent

Schedule Dose2 Followup Email

Vaccine StatusDose 1 Administered

VaccineTestVaccine1

Vaccine InventorySomTestInventoryUAT3

Vaccine DosageFirst Dose

Injection SiteLeft Deltoid

RouteIntramuscular (IM)

Administered ByKaitlin Gates

On Behalf of (Clinician)Steve DiGangi

Case OwnerUser16073838354179855083

Additional Information

Status

Notes

Change Vaccine Inventory

Change Recipient

Audience

Healthcare Provider

Healthcare Location Manager

Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

- 1. Search for the correct recipient in the **UPDATED CONTACT NAME** field
- 2. Click **FINISH**
- 3. A Success Confirmation pop-up should appear at the top of the screen
- 4. 3. A Success confirmation pop-up should appear at the top of the screen

Change Recipient

Existing Contact Name:
Jane WrongName

Updated Contact Name:

Jane RightName

×

Case Number :
00112361

Account Name:
Clinic ABC Loc 1

Vaccine Status:
Dose 1 Administered

Appointment Date/Time:
Jan 18, 2021, 10:00:00 AM

Cancel

Finish

NCDHHS
CVMS Provider Portal

Success!
Recipient Updated Successfully!

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More

DETAILS RELATED

Change Vaccine Inventory

Change Recipient

Case Number
00112361

Account Name
Clinic ABC Loc 1

Contact Name
Jane RightName

Appointment Date/Time
1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination

Vaccine Status
Dose 1 Administered

Vaccine
TestVaccine1

Vaccine Inventory
SomTestInventoryUAT3

Vaccine Dosage
First Dose

Injection Site
Left Deltoid

Route

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

The status of the incorrect Recipient will be reverted to their previous status, (e.g., ‘Dose 1 Administered’ will revert to ‘Registered’).

The correct Recipient’s status will be updated to reflect the administered vaccine (e.g., updated from ‘Registered’ to ‘Dose 1 Administered’).

Post-Vaccine Administration Reminders

Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after
2. The second is **ONE WEEK AFTER** the first dosage is administered.

They also will receive a **NOTIFICATION** informing you of your **PROOF OF VACCINATION**. This will be automatically generated for them.

NOTE: COVID-19 vaccination record cards should be provided to the Recipient or their guardian after the Recipient receives their COVID-19 vaccine.

The Recipient can request you provide a completed vaccination record card with important information about the COVID-19 vaccine they received (i.e., vaccine manufacturer, lot number, date of first dose administration, and second dose due date).

You can also suggest that they take a picture of their vaccination record so they can remember the type of vaccine they received and their second dose due date.

Audience

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Tips

Learn more about viewing a Recipient's Proof of Vaccination in the **CVMS Provider Portal Viewing Proof of Vaccination User Guide**.

Recipients who receive a **SINGLE-DOSE** product will not receive any second-dose notifications.

Appendix

When the Recipient is NOT in an active Vaccine Group

When you verify **RECIPIENT’S VACCINE GROUP**, and the Recipient is **NOT** in an active Vaccine Group, you are still able to **CREATE THE APPOINTMENT BOOKING** and **ADMINISTER THE COVID-19 VACCINE**.

***Option #1:** If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** the COVID-19 Vaccine Registration form in the **COVID-19 VACCINE PORTAL** for recipients or you can update the Recipient’s registration information on their behalf.*

***Option #2:** You can administer the vaccine at your discretion, regardless of the Vaccine Group listed in CVMS.*

Audience

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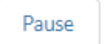
Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Registered

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not compatible with CVMS.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/18/2020	<ul style="list-style-type: none">• Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page• Updated Process for Recipients that are not Eligible yet / Not Approved	9-18, 22	Steve DiGangi
2	1/10/2021	<ul style="list-style-type: none">• Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Help Desk Portal information	1, 2, 22	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none">• Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route• Included information about Recipients who may receive a first dose outside of CVMS	5, 9-11, 13-17, 21	Steve DiGangi
4	1/28/2021	<ul style="list-style-type: none">• Added Location Switcher button explanation section• Added new section: Edit Vaccine Administration Details After Submission• Added new section: Edit Vaccine Administration Recipient	8-12, 23-31, 32-37	Steve DiGangi Kaitlin Gates
5	3/1/2021	<ul style="list-style-type: none">• Added information about single-dose products	21, 22, 30, 39	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none">• Updated information regarding COVID-19 Vaccine Portal• Removed eligibility branding to replace with Vaccine Group	14, 41	Steve DiGangi